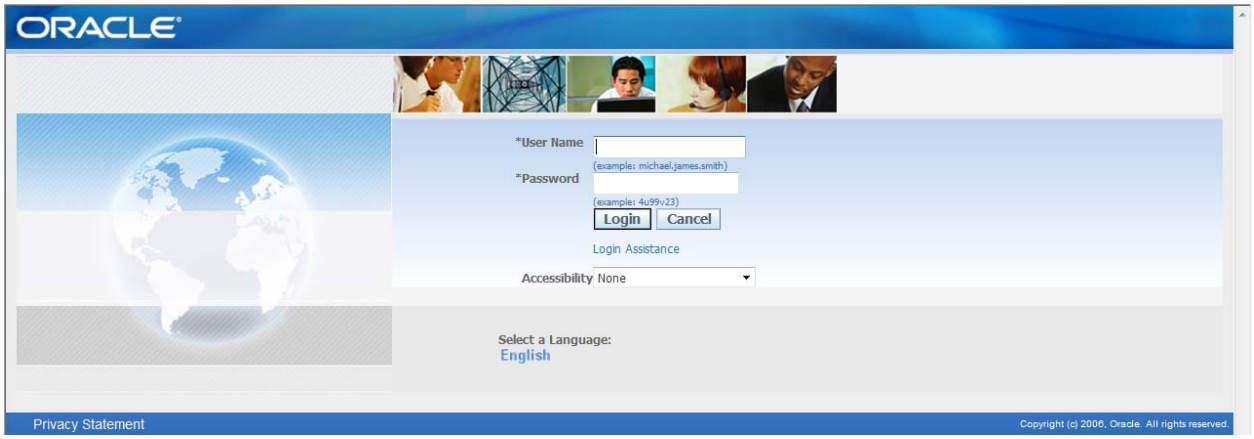
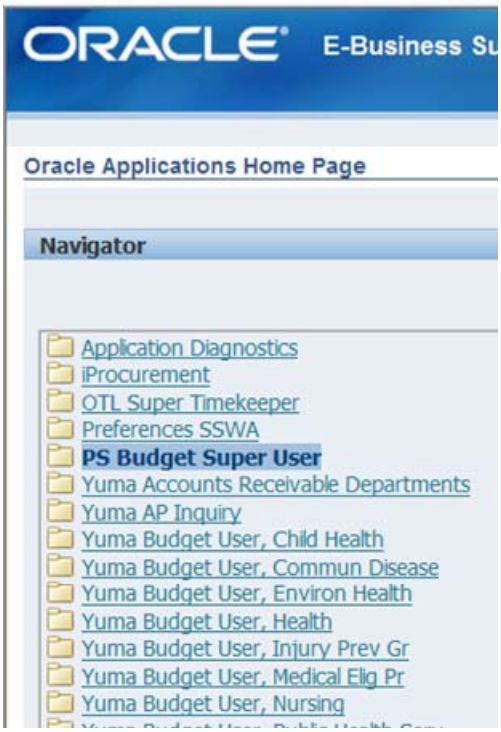
Part IV: **Oracle Line Items**

Accessing Budget Worksheets:

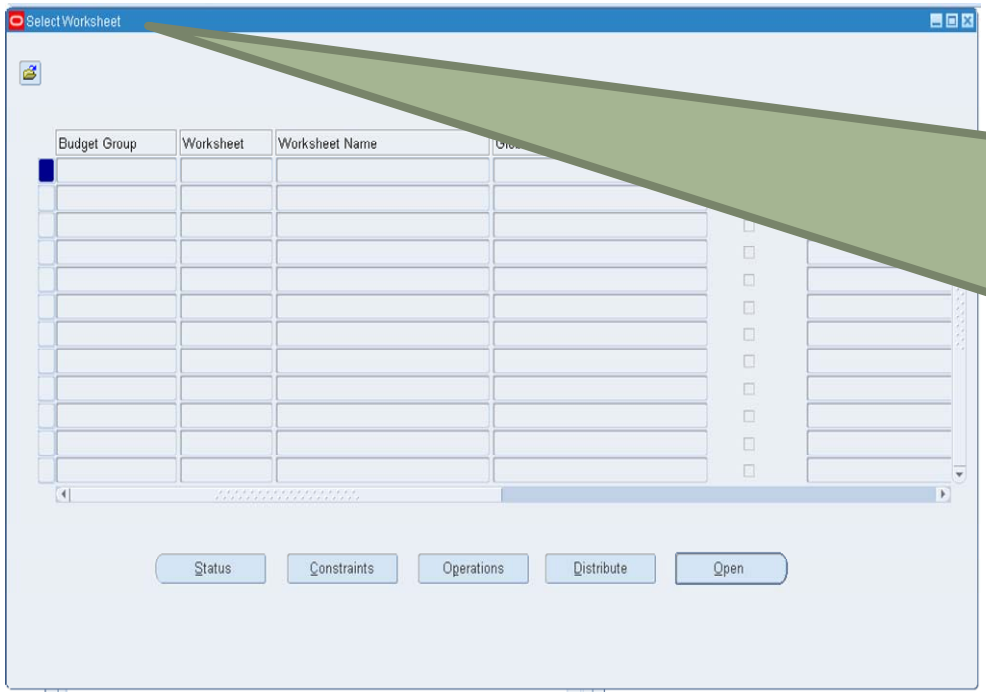


Sign on to Oracle

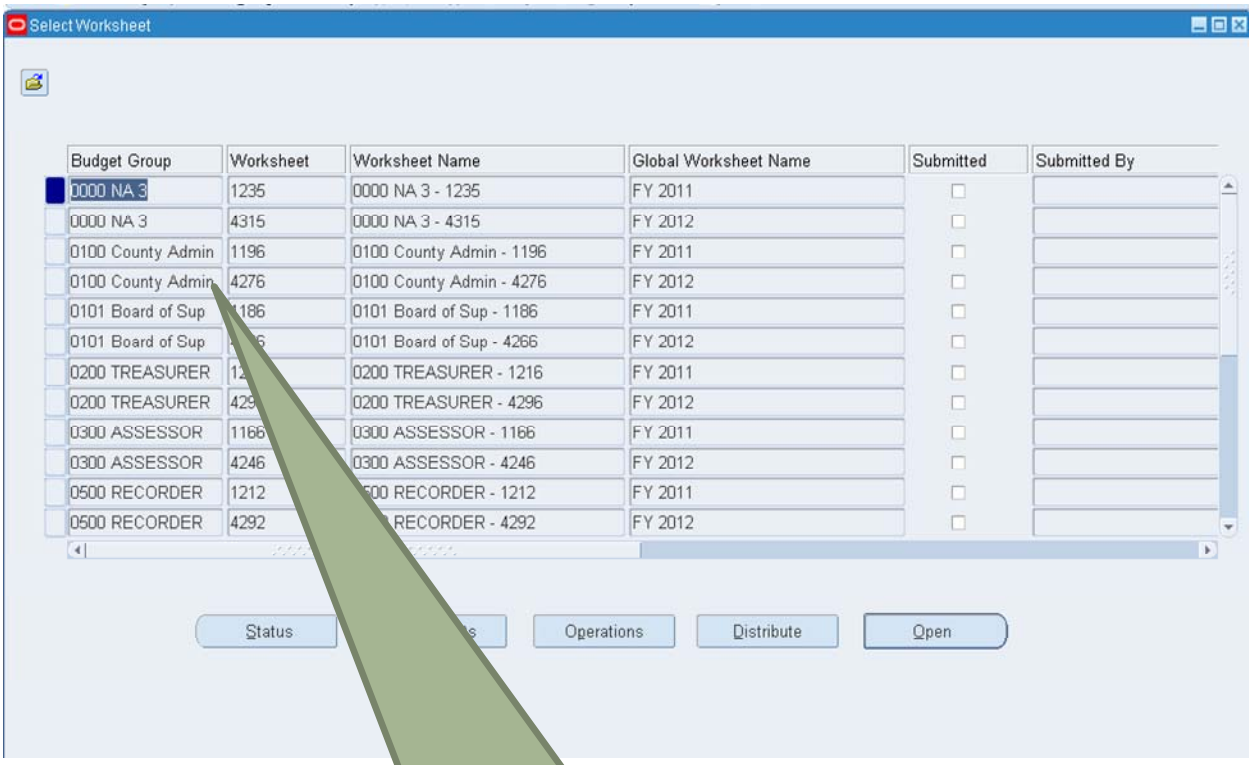


Click on the desired worksheet.

Each users menu will be different. Everyone identified as budget contacts should be able to view the budgets which your department is responsible for. There may be just one worksheet or multiple worksheets.



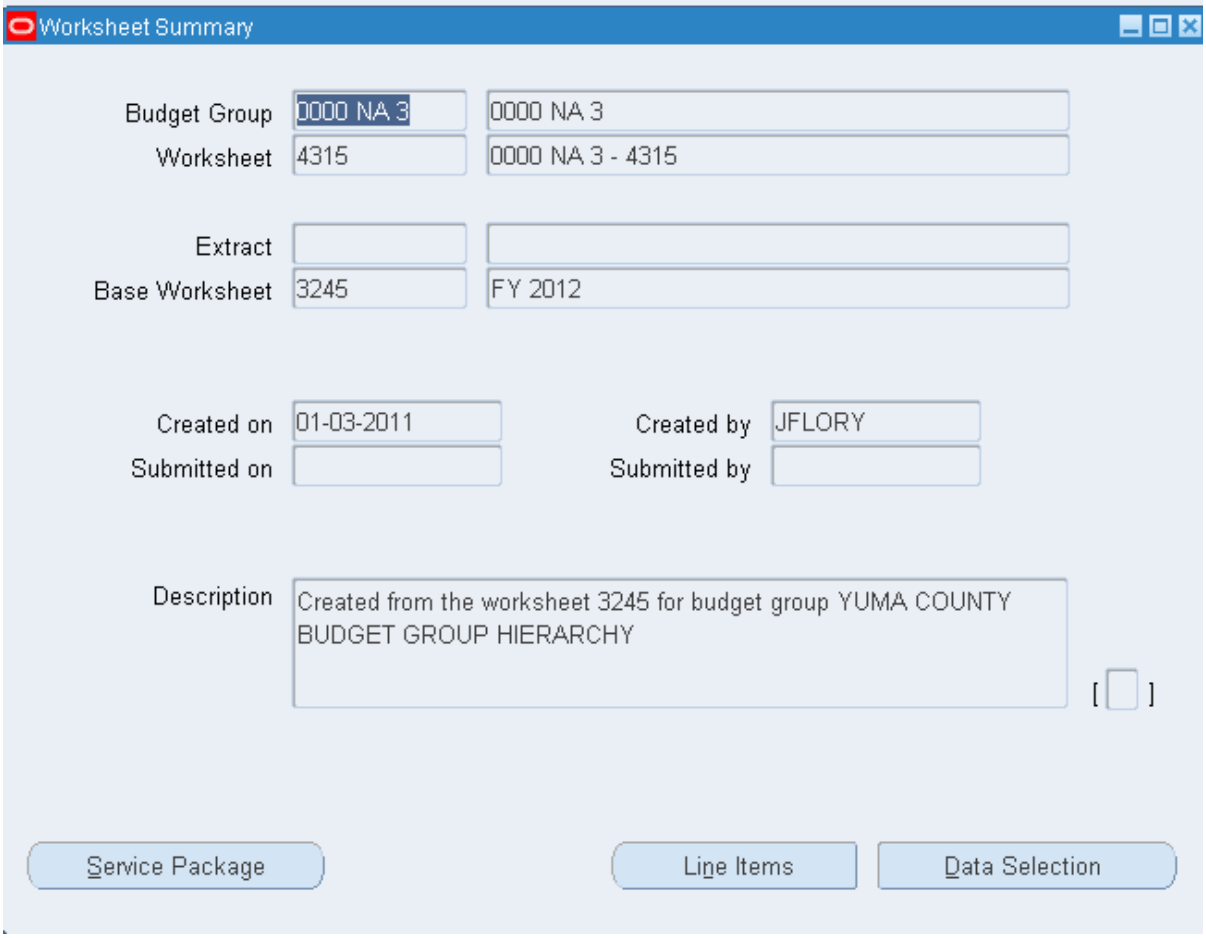
The "Select Worksheet" screen will appear blank at first. Press the Ctrl & F11 keys to populate the list of worksheets.

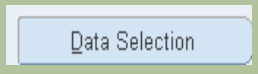


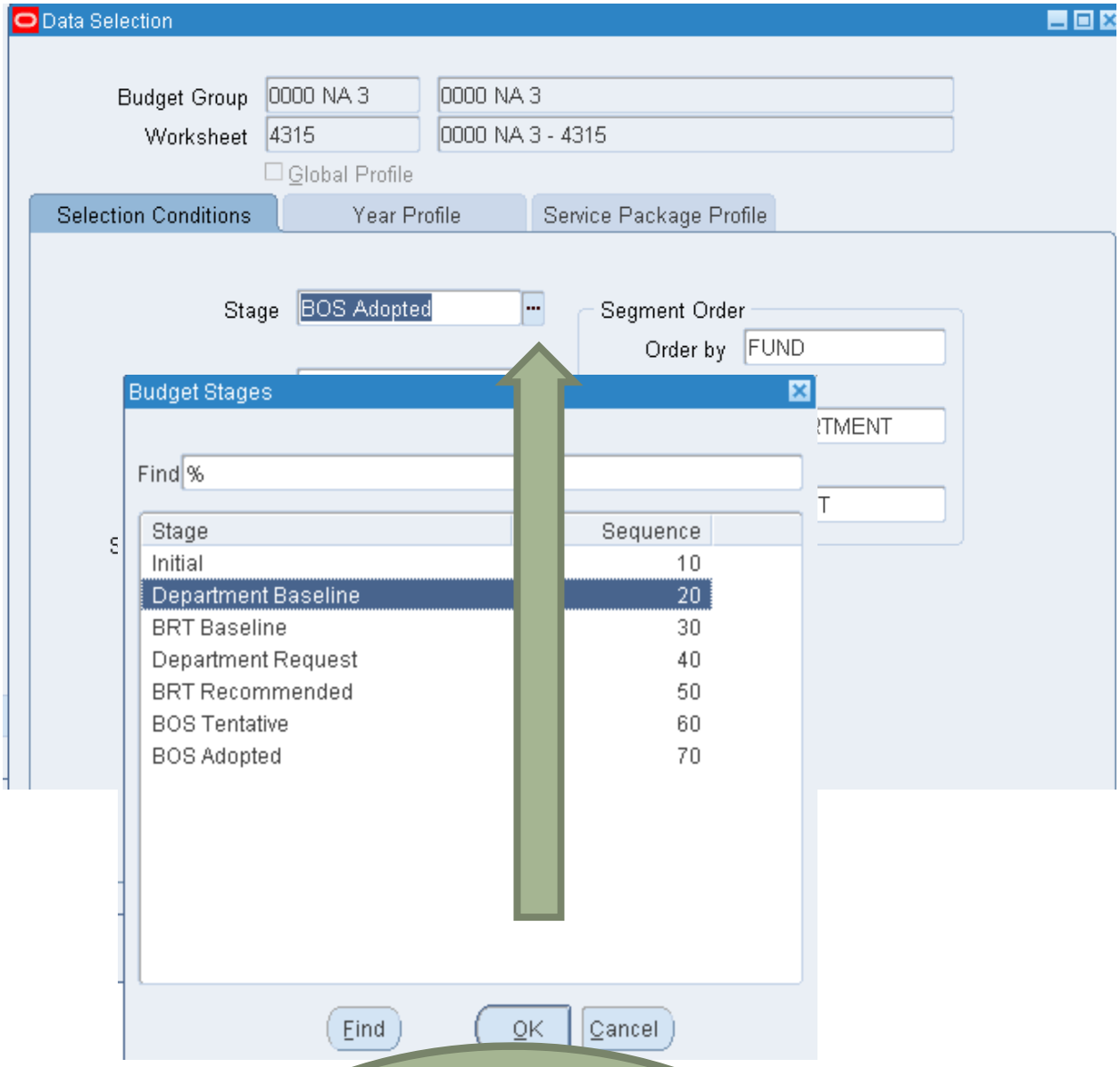
To enter into the worksheet, click on the blue/gray box next to that worksheet (Budget Group) and click Open.

Each user's worksheet screens will be different. You may have one worksheet or multiple worksheets depending on the number of budgets administered by your department.

Each budget will have two worksheets: one for the current year and one for the new year. Please remember to open the worksheet for the new year.

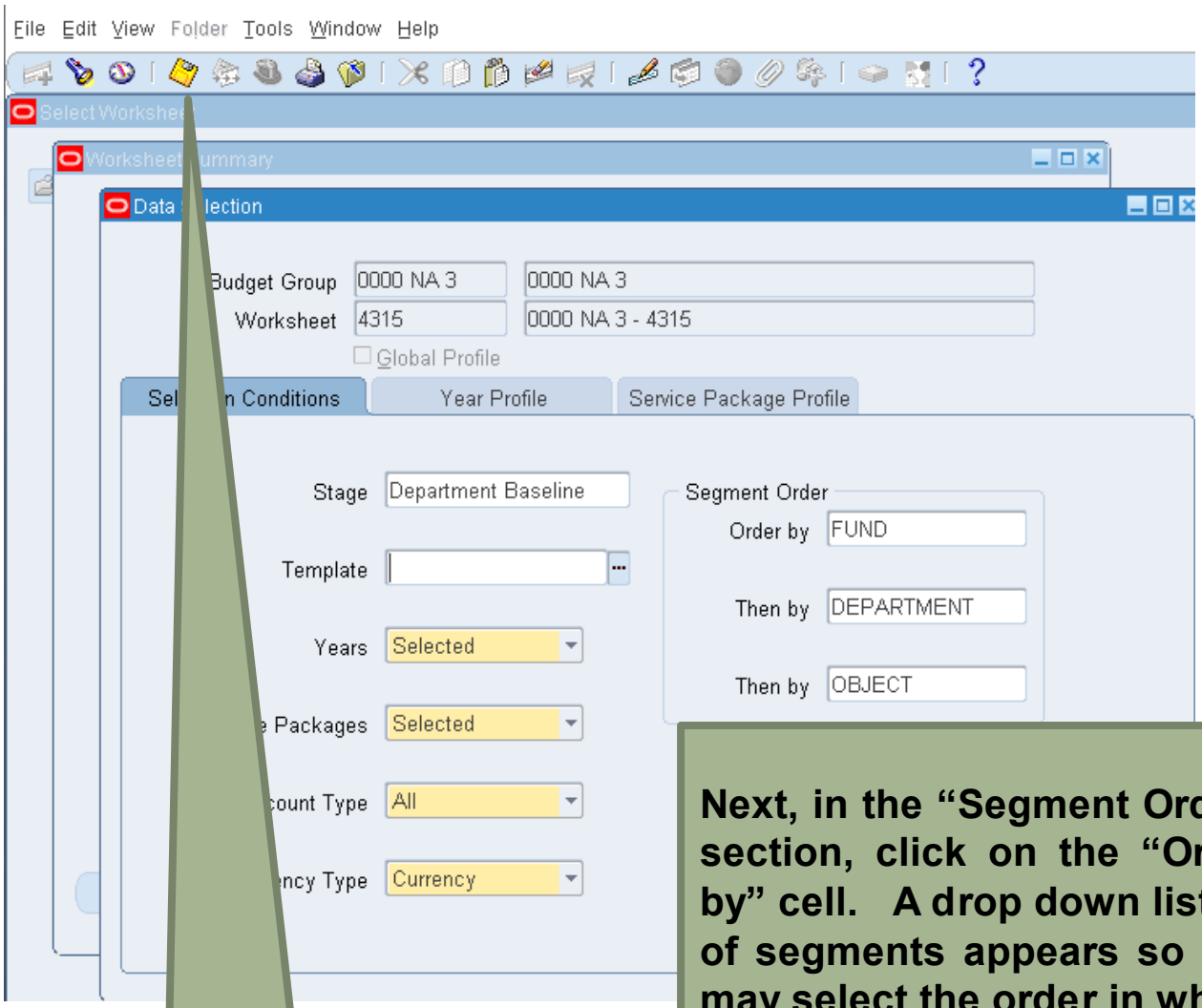


The "Worksheet Summary" page opens up. First, you will want to click 



This is where the stage of the budget is determined. Click on the drop down feature at the "Stage" cell.

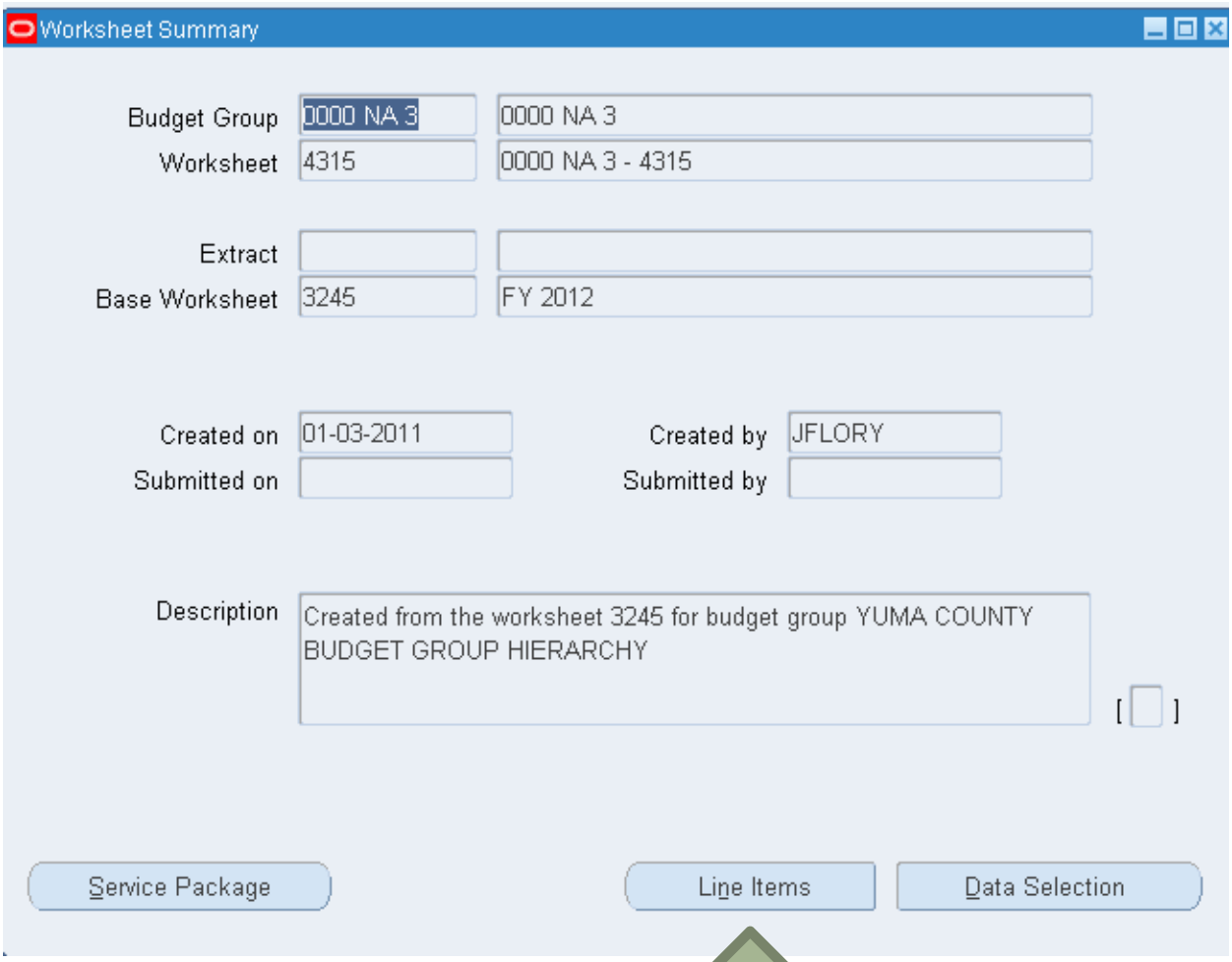
Remember to change the stage to reflect the current stage.



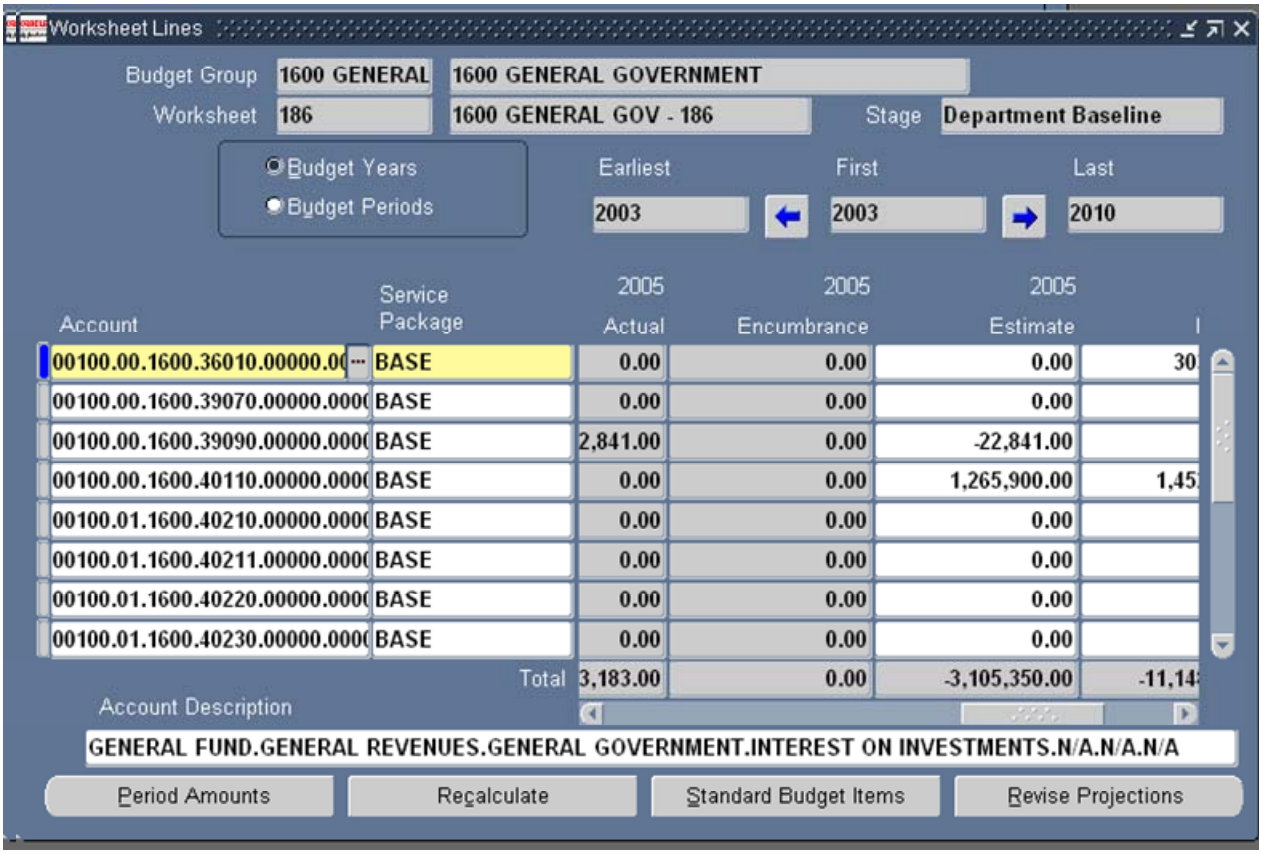
Save your work. Then exit out of the "Data Selection" page to get back to the "Worksheet Summary".

Next, in the "Segment Order" section, click on the "Order by" cell. A drop down listing of segments appears so you may select the order in which you want to view your data. The "Account Segments" listing appears when you click on each of the sections. Insert the following segments in each cell.

Line Item Entry:

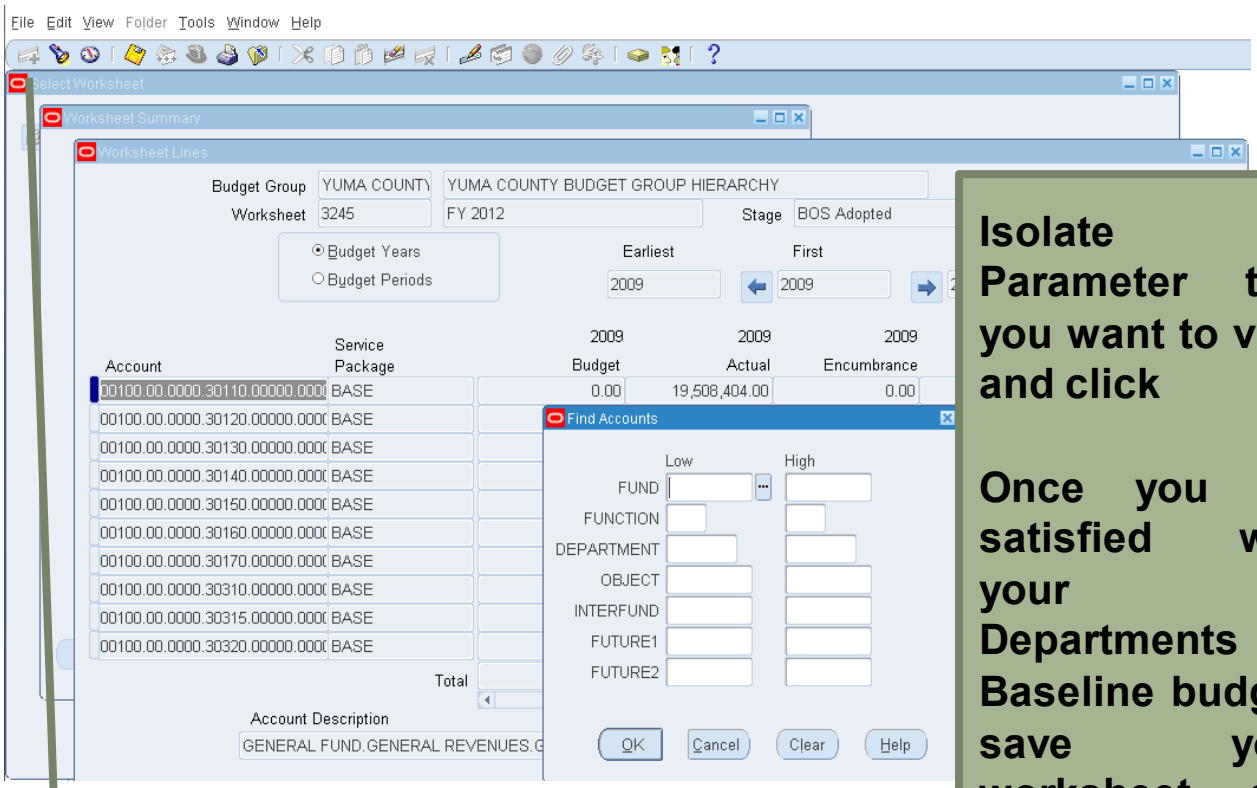


To view and make changes to your department's line item budget, click



Type Ctrl and F11 to display line item data. This takes you to the "Worksheet Lines" page. Here you can view actual activity and budget activity. This worksheet opens to the first columns which are grayed out. If you scroll to the right, you will see the budget columns which are white. This is where you will make any adjustments to your current year estimates and next years Budget.

The Current Year Estimate values currently appearing in this field for non-personnel lines are simply year-to-date amounts. You will need to change these values to your best estimate of what the total 12 month expenditure (or revenue) will be for the Current fiscal year.



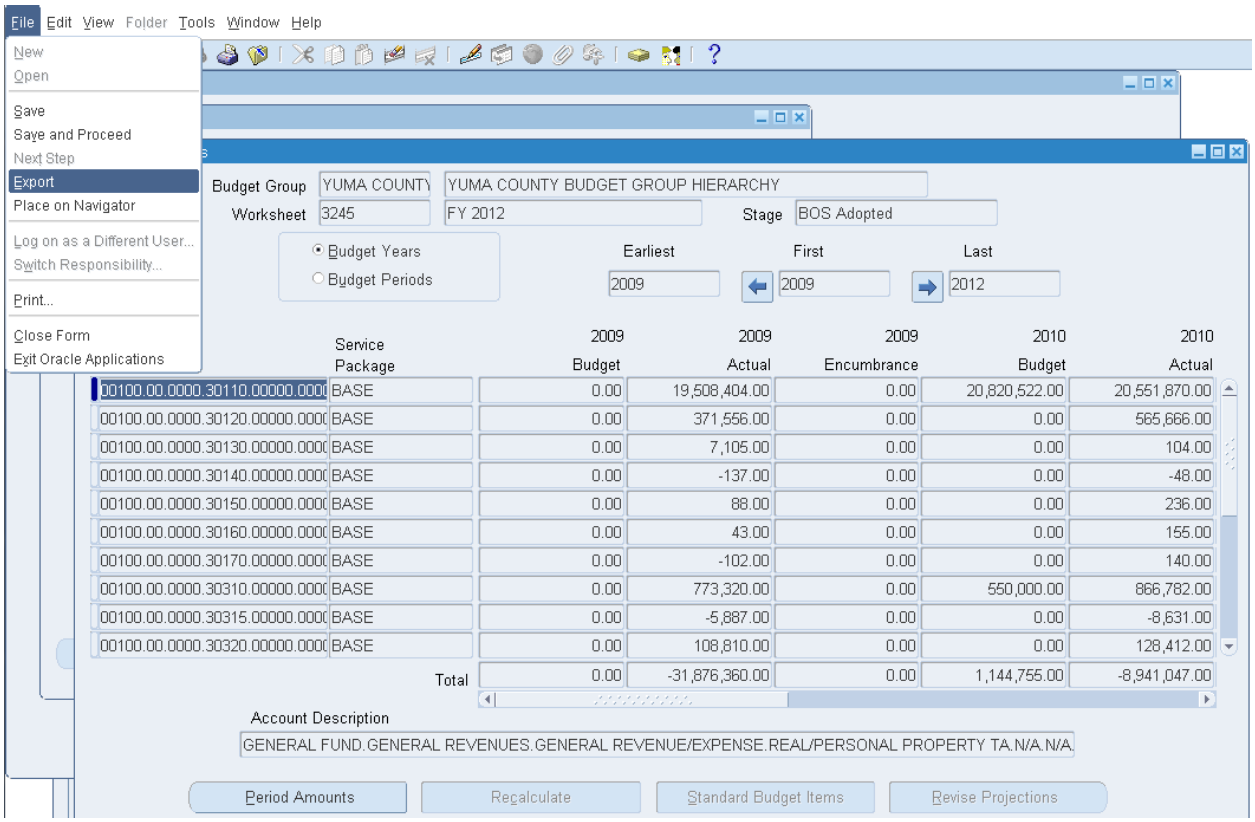
If you want to request budget in a line item that does not exist in your worksheet you will need to manually enter in the account number you want. This is done by clicking button at the top left corner of your toolbar. This will insert a blank row into your worksheet and you may enter the new request.

Isolate the Parameter that you want to view and click

Once you are satisfied with your Departments Baseline budget, save your worksheet, and exit out of Oracle. Submit any line item forms to the Budget department and notify the Office of Management & Budget that you have completed your baseline budget.

If you just want to look at a particular fund in your department, you can bring up that fund by clicking on the flashlight.

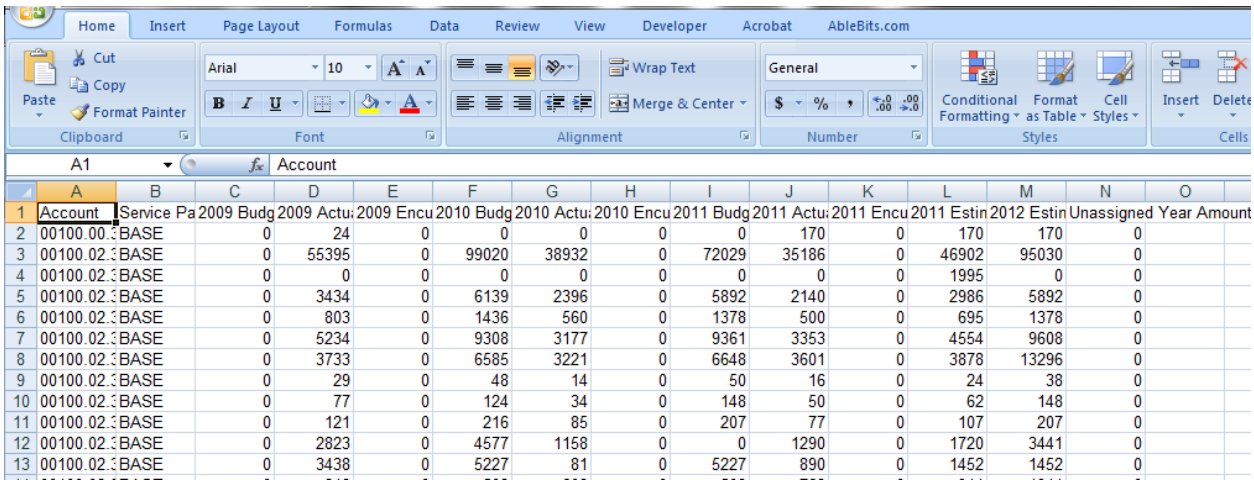
Printing Line Item Reports:



If you would like to print out your line item worksheet, you will need to export them to Excel. When you are in the "Worksheet Lines" screen, go to File→Export.

The download screen will appear. Select Open.

Your data will open in Excel and you can format it to suit your needs. If you have any problems printing your line item reports, please call the Office of Management & Budget and we will be happy to assist you.



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A1 Account

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Account	Service Pa	2009 Budg	2009 Actu	2009 Encu	2010 Budg	2010 Actu	2010 Encu	2011 Budg	2011 Actu	2011 Encu	2011 Estin	2012 Estin	Unassigned	Year Amount
2	00100.00.3	BASE	0	24	0	0	0	0	0	170	0	170	170	0	
3	00100.02.3	BASE	0	55395	0	99020	38932	0	72029	35186	0	46902	95030	0	
4	00100.02.3	BASE	0	0	0	0	0	0	0	0	0	1995	0	0	
5	00100.02.3	BASE	0	3434	0	6139	2396	0	5892	2140	0	2986	5892	0	
6	00100.02.3	BASE	0	803	0	1436	560	0	1378	500	0	695	1378	0	
7	00100.02.3	BASE	0	5234	0	9308	3177	0	9361	3353	0	4554	9608	0	
8	00100.02.3	BASE	0	3733	0	6585	3221	0	6648	3601	0	3878	13296	0	
9	00100.02.3	BASE	0	29	0	48	14	0	50	16	0	24	38	0	
10	00100.02.3	BASE	0	77	0	124	34	0	148	50	0	62	148	0	
11	00100.02.3	BASE	0	121	0	216	85	0	207	77	0	107	207	0	
12	00100.02.3	BASE	0	2823	0	4577	1158	0	0	1290	0	1720	3441	0	
13	00100.02.3	BASE	0	3438	0	5227	81	0	5227	890	0	1452	1452	0	